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## Brazil

## DAIRY AND PRODUCTS ANNUAL

### Annual Dairy Report

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**Report Highlights:**

Post forecasts fluid milk production to increase by 5 percent in 2010, supported by the improved outlook of the Brazilian economy and higher domestic demand. The impact of the world financial crisis on Brazil's dairy sector was a slowdown in the increase of fluid milk production in 2009 and a decrease in exports. However, the Brazilian dairy industry is optimistic about the growth of the economy and expects production of milk and milk products to increase in 2010.

**Executive Summary:**

The outlook for the Brazilian economy in 2010 calls for a rebound in economic growth of between 4 and 5 percent, with lower inflation and a continued increase in consumer purchasing power. The Brazilian dairy industry is also optimistic about the growth of the economy and expects production of milk and milk products to increase in 2009. However, uncertainty remains regarding Brazilian dairy exports as the valuation of the Brazilian currency makes Brazilian dairy products not competitive in world markets. Post revised 2009 production and export estimates for the Brazilian dairy sector to reflect new estimates made by trade sources.

## **Commodities:**

Dairy, Milk, Fluid

## **Production:**

Post forecasts fluid milk production to increase by 5 percent in 2010, supported by the improved outlook of the Brazilian economy and higher domestic demand.

Post also revised the growth in fluid milk production in 2009 to be around 3 percent, slower than the average of 4 to 6 percent growth in recent years. The slowdown in the increase of fluid milk in 2009 is attributed mostly to the international credit crisis, excess domestic production, higher production costs, and higher dairy imports.

## **Consumption:**

Consumption of fluid milk is forecast to increase by 5 percent in CY 2010. The increase is derived mostly from an expected increase in industrial use consumption the increase in the employment rate and in the purchasing power of Brazilian consumer is expected to improve next year.

The increase in consumption of UHT is due to several factors, including greater convenience to consumer, carton packaging (not glass or plastic), no need for refrigeration, and competitive pricing. Brazilian supermarkets sell predominantly UHT milk, leaving "B" and "C" type refrigerated fresh milk to be sold by the traditional mom-and-pop bread and convenience stores, but at lower volumes.

Recently, multinational and national dairy companies have launched several new products in the area of "functional foods". Ingredients or components most used in these new products are active lactobacillus, calcium, soy fractions, "omega-3" fatty acids and cholesterol-lowering sterols. This seems to be a trend for dairy products.

An important aspect of domestic fluid milk consumption is the increasing competition from non-dairy products, such as soymilk and other specialty lactose-free products. As more companies enter this

market, prices decline and consumption increases. Health concerns are behind the major increase in consumption of these non-dairy products.

### Prices:

The average price of fluid milk (type "C") paid to producers during Jan-Sep 2009 was R\$ 0.71 in Sao Paulo state, as compared to R\$ 0.74 during same period in 2008. Assuming the average exchange rate of R\$ 1.80 per U.S. dollar in 2009, these prices were respectively US\$ 0.40 and US\$ 0.39 per liter.

<b>São Paulo: Monthly Average Price Received by Producers</b>				
<b>for Fluid Milk, Type C, per Liter, Jan-Sep 2006-09:</b>				
<b>Month</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
Jan	0,4280	0,5112	0,6513	0,6331
Feb	0,4512	0,5186	0,6837	0,6358
Mar	0,4609	0,5496	0,7110	0,6385
Apr	0,4985	0,5732	0,7554	0,6536
May	0,5216	0,6176	0,7776	0,6871
Jun	0,5257	0,6507	0,8050	0,7378
Jul	0,5425	0,7096	0,7925	0,8189
Aug	0,5546	0,7638	0,7637	0,8171
Sep	0,5460	0,7843	0,7173	0,7862
Year Average	0,5032	0,6310	0,7397	0,7120
(in U.S.\$)	0.28	0.35	0.41	0.40

Source: Cepea

Average Exchange rate for Sep 2009: 1 US\$ = 1.80R\$

### Trade:

Brazil imports insignificant volumes of fluid milk and most of the imports consist of packaged UHT milk sold by companies from Argentina and Uruguay with commercial interests in Brazil. However, because of the valuation of the Brazilian currency in 2009, imports of UHT expanded by 500 percent. Brazil is expanding exports of sweetened condensed milk to diverse markets, such as, Venezuela, Philippines, Paraguay, and the United States.

### Tariff Rate Table

Tariff Number (HTS)	Product Description	Rate (%) (1)	Other Info
0401.10.10	Milk and Cream, UHT	14	Mercosul: Zero

0401.10.90	Milk and Cream, UHT	12	Mercosul: Zero
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Note: (1) MERCOSUL's Common External Tariff (CXT). The CXT is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product.

### **Stocks:**

Current milk and dairy products stocks held by major dairy companies are considered operating stocks to meet short term demand for their products there are no government held stocks of milk or milk products in Brazil.

### **Policy:**

On June 22, 2009, the President of Brazil announced the 2009/2010 Agriculture and Livestock Plan (PAP). The new PAP allocates a total of R\$ 107.5 billion (US\$ 53.7 billion) to finance production costs, marketing and investment for the upcoming 2009/2010 crop year (October 2009 through September 2010), an increase of 37 percent over last year's plan. Of this amount, R\$ 92.5 billion (US\$ 46 billion) is allocated for commercial and export oriented agriculture, up 42.3 percent from the same period last crop year, while R\$ 15 billion (US\$ 8 billion) is allocated to family agriculture.

The performance of the agricultural sector over the last several decades mitigated the effects of the international financial crisis. For farmers to ensure the conditions for continued growth, the Brazilian government intensified measures to maintain liquidity and the use of instruments to support production and marketing.

In addition to the funds, the 2009/2010 Agriculture and Livestock Plan established as the guidelines for agricultural policy of the next crop, the following objectives: a) to reinforce the support to medium-sized farmers; b) to support and strengthen cooperatives; c) to stimulate and develop sustainable practices of production, and preserve environmental resources; d) to increase the resources of the National System of Rural Credit (SNCR), mainly at controlled interest rates; e) to improve the liquidity of rural product; f) to reduce the producer's financial costs; g) to increase rural insurance; h) to increase and encourage organic production; i) to strengthen the increase of biofuel production; j) to support the commercialization with minimum prices.

Dairy cattle producers and dairies can benefit from the following programs, with subsidized interest rates (6.75 percent per year), to increase productivity and overall milk production:

- **Interest Rates.** The government decided to maintain last year's level of subsidized interest rates at 6.75 percent for this year's financing. The new PAP also includes creation of financing lines and extension of credit limits.
- **Production and Marketing Credit.** Of the total amount of R\$ 92.5 billion (US\$ 46 billion) for commercial agriculture, R\$ 54.2 billion (US\$ 27.1 billion) is allocated to financing production and marketing costs at subsidized interest rates of 6.75 percent per year;
- **Government support programs.** A total of R\$ 8.5 billion (US\$ 4.3 billion) was allocated for three government support programs: a) Government Generation of Employment and Income Program (R\$ 5 billion); b) Government Aid to Cooperativism Program (R\$ 2 billion); and c) Government Incentive to Sustainable Agribusiness Program (R\$ 1.5 billion).

- Minimum price program. The current minimum prices were adjusted to reflect increased costs of production and vary according to each commodity, such as milk (15% higher), soy (10% higher) and corn (6% higher);
- Investment Credit. Total funds available for financing investment in farm and livestock program is R\$ 14 billion (US\$ 7 billion), an increase of 37 percent over last year's plan, at subsidized interest rates of 6.75 percent per year. The program was created last year, and supports recuperation of pasture areas and adoption of sustainable practices of production.
- Energy. On May 5, 2009, the government announced a new program for funding the storage of ethanol and made available R\$ 2.31 billion (US\$ 1.1 billion) to finance the storage of up to 3.3 billion liters of ethanol.
- Increase of 15 percent in funds for financing forest plantations (R\$ 200 million);
- Increase of 59 percent in funds for subsidizing the premium of Rural Insurance (R\$ 273 million);

Milk producers are also entitled to state dairy development programs designed to increase productivity through pasture improvement and animal genetics. State government programs are also developed to assist and improve social and economic conditions of small milk producers. However, the most important state subsidy program to milk producers is the exemption of the state value-added tax (ICMS) on the sale of milk by producers and cooperatives. This benefit, however, is only available to a few states in Brazil, mostly in the center-west and south regions.

In addition to these federal and state programs, milk producers also benefit from financing programs from large dairies, such as Nestle, which are specifically designed to increase milk productivity and quality. These programs are only available for those integrated milk producers with these respective dairies.

## Production, Supply and Demand Data Statistics:

PSD: Dairy, Milk, Fluid (HTS: 0401.10.10; 0401.10.90)

Dairy, Milk, Fluid Brazil	2008			2009			2010			
	2008			2009			2010			
	Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			Market Year Begin: Jan 2010			
	USDA Official Data		Old Post	USDA Official Data		Old Post	USDA Official Data		Jan	
			Data			Data			Data	
Cows In Milk	16,700	16,700	16,700	17,023	17,023	17,200			17,600	(1000 HEAD)
Cows Milk Production	28,890	28,890	27,820	30,335	30,335	28,795			30,235	(1000 MT)
Other Milk Production	0	0	0	0	0	0			0	(1000 MT)
Total Production	28,890	28,890	27,820	30,335	30,335	28,795			30,235	(1000 MT)
Other Imports	3	10	1	2	2	6			5	(1000 MT)
Total Imports	3	10	1	2	2	6			5	(1000 MT)
Total Supply	28,893	28,900	27,821	30,337	30,337	28,801			30,240	(1000 MT)
Other Exports	1	2	10	2	2	30			40	(1000 MT)
Total Exports	1	2	10	2	2	30			40	(1000 MT)
Fluid Use Dom. Consum.	10,674	10,680	10,684	11,230	11,230	10,900			11,475	(1000 MT)
Factory Use Consum.	17,658	17,658	16,667	18,505	18,505	17,371			18,125	(1000 MT)
Feed Use Dom. Consum.	560	560	460	600	600	500			600	(1000 MT)
Total Dom. Consumption	28,892	28,898	27,811	30,335	30,335	28,771			30,200	(1000 MT)
Total Distribution	28,893	28,900	27,821	30,337	30,337	28,801			30,240	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
CY. Exp. to U.S.	0	0	0	0	0	0			0	(1000 MT)

**Commodities:**

Dairy, Cheese

**Production:**

*Note: There are no official statistics on production and consumption of cheese in Brazil. OAA production estimates for cheese are based on trade sources and also include “informal” cheese production.*

Post forecasts cheese production in 2010 to increase by over 5 percent boosted mostly by higher domestic demand for cheese, principally from the fast-food industry.

**Consumption:**

Human consumption of fresh cheese is expected to continue to increase in 2010, but most of the increase in demand will continue to come from the fast-food industry, institutional and domestic consumers of other “specialty” cheeses (Gruyere, Camembert, Brie, Gouda, and Cheddar).

**Prices**

Average wholesale prices of Brazilian-produced cheese by major types are:

Type	US\$/Kilogram
Minas (fresh farmer type)	12.34
Mozzarella	15.97
Provolone	19.75
Parmesan	25.53

Notes: (1) Prices for Sao Paulo market, as of 10/15/2009.

(2) Average Exchange Rate for Sep 2009: US\$ 1.00=R\$1.80

**Trade:**

Cheese imports in 2010 are expected to increase from the 2009 level mostly because of the valuation of the Brazilian currency. Uruguay and Argentina remain as the main suppliers of cheese to Brazil, basically because of the preferential tariff treatment derived from the MERCOSUL Agreement.

Exports of cheese are projected to increase slightly in 2010, but at slower rate, due the valuation of the Brazilian currency.

**Tariff Rate Table**

Tariff Number (HTS)	Product Description	Rate (%) CXT *	Other Info
0406.10.10	Cheese, Mozzarella (1)	16	Mercosul: 27%
0406.10.90	Cheese, Other	16	Mercosul: Zero
0406.20.00	Cheese: Grated or Powdered	16	Mercosul: Zero
0406.90.10	Cheese, with a fat content less than 36 %, by weight (1)	16	Mercosul: 27%
0406.90.20	Cheese with a fat content superior or equal to 36 % and less than 46%, by weight (1)	16	Mercosul: 27%

\* CXT: MERCOSUL Common External Tariff. The CXT tariff is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product.

Note (1): Effective June 1, 2001, these types of cheeses were included on the "exception list" of the Common External Tax (CXT), of the MERCOSUL, per Resolution 16/01, of the Foreign Trade Chamber (CAMEX), which altered Annex Two of the Decree Number 3,704 of December 27, 2000. The 27% tax is charged in addition to the Import Tariff of 16 percent for all imported cheeses, including MERCOSUL members.

### **Stocks:**

There are no government stocks of cheese in Brazil.

## Production, Supply and Demand Data Statistics:

PSD: Dairy, Cheese

Cheese Dairy, Brazil				2008			2009			2010		
				2008			2009			2010		
				Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			Market Year Begin: Jan 2010		
				USDA Official Data		Old Post	USDA Official Data		Old Post	USDA Official Data		Jan
						Data			Data			Data
Beginning Stocks	0	0	0	0	0	0			0	(1000 MT)		
Production	640	640	607	660	660	614			648	(1000 MT)		
Other Imports	5	5	5	4	4	10			10	(1000 MT)		
Total Imports	5	5	5	4	4	10			10	(1000 MT)		
Total Supply	635	645	612	664	664	624			658	(1000 MT)		
Other Exports	8	10	7	10	10	7			10	(1000 MT)		
Total Exports	8	10	7	10	10	7			10	(1000 MT)		
Human Dom. Consumption	627	635	605	654	654	617			648	(1000 MT)		
Other Use, Losses	0	0	0	0	0	0			0	(1000 MT)		
Total Dom. Consumption	627	635	605	654	654	617			648	(1000 MT)		
Total Use	635	645	612	664	664	624			658	(1000 MT)		
Ending Stocks	0	0	0	0	0	0			0	(1000 MT)		
Total Distribution	635	645	612	664	664	624			658	(1000 MT)		
CY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)		
CY. Exp. to U.S.	0	2	0	0	0	0			0	(1000 MT)		

**Commodities:**

Dairy, Butter

**Production:**

*Note: There are no official statistics on production and consumption of butter in Brazil. OAA production estimate for butter is based on trade sources, and also includes "informal" butter production.*

Butter production is projected to increase by 2.6 percent in CY 2010, reflecting an increase in domestic demand, despite strong competition from margarine. Production of margarine is expected to rise to over one million metric tons in 2010, up to 5 percent from 2009.

**Prices**

Type	US\$/kilogram
Salted	13.05
Unsalted	11.97

Notes: (1) Prices for Sao Paulo market, as of 10/15/2009.

(2) Average Exchange Rate for Sep 2009: US\$ 1.00=R\$ 1.80

**Trade:****Tariff Rate Table**

Tariff Number	Product Description	Rate (%) CXT *	Other Info
0405.10.00	Butter	16	Mercosul: Zero
0405.90.10	Butter Oil	16	Mercosul: Zero

\* CXT: MERCOSUL Common External Tariff (CXT). The CXT tariff is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product.

**Stocks:** There are no government stocks of butter in Brazil.

## Production, Supply and Demand Data Statistics:

PSD: Dairy, Butter

Dairy, Butter	Brazil	2008			2009			2010			
		2008			2009			2010			
		Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			Market Year Begin: Jan 2010			
		USDA Official Data		Old Post	USDA Official Data		Old Post	USDA Official Data		Jan	
				Data			Data			Data	
Beginning Stocks		0	0	0	0	0	0			0	(1000 MT)
Production		84	85	84	86	86	76			78	(1000 MT)
Other Imports		1	2	1	1	1	8			8	(1000 MT)
Total Imports		1	2	1	1	1	8			8	(1000 MT)
Total Supply		85	87	85	87	87	84			86	(1000 MT)
Other Exports		4	2	4	5	5	2			2	(1000 MT)
Total Exports		4	2	4	5	5	2			2	(1000 MT)
Domestic Consumption		81	85	81	82	82	82			84	(1000 MT)
Total Use		85	87	85	87	87	84			86	(1000 MT)
Ending Stocks		0	0	0	0	0	0			0	(1000 MT)
Total Distribution		85	87	85	87	87	84			86	(1000 MT)
CY Imp. from U.S.		0	0	0	0	0	0			0	(1000 MT)
CY. Exp. to U.S.		0	0	0	0	0	0			0	(1000 MT)

**Commodities:**

Dairy, Dry Whole Milk Powder

Dairy, Milk, Nonfat Dry

**Production:**

*Note: There are no official statistics on production and consumption of powdered milk in Brazil. OAA estimates for powdered milk production (nonfat and whole milk) are based on trade sources.*

Post forecasts total powdered milk production to rebound in 2010 and increase by over 6 percent. There are two new milk powder plants to come into production, which should increase production capacity. The following factors support higher Brazilian powdered milk production in 2010:

- a. Expansion of production capacity due to the long-term investment funds provided by the National Bank of Economic and Social Development (BNDES) at subsidized interest rates.
- b. Higher sanitary standards for imported milk, combined with higher import tariffs and import procedures, which reduced imports of subsidized milk and led multinational and Brazilian companies to invest in domestic powdered milk production.
- c. Higher allocation of government funds for social programs at the federal and state levels, due principally to 2010 being a general election year.

**Consumption:**

Post forecasts 2010 powdered milk consumption to remain at the same level as in 2009.

**Prices**

Average wholesale prices of powdered milk, by type, are:

Type	US\$/kilogram
Whole milk powder	8.54
Nonfat dry milk powder	10.98

Notes: (1) Prices for Sao Paulo market, as of 10/15/2009.

Average Exchange Rate for Sep 2009: US\$ 1.00=R\$ 1.80

**Trade:**

Imports of milk powder sold by companies from Argentina and Uruguay with commercial interests in Brazil, significantly increased in 2009. The Brazilian government is likely to take measures to prevent higher dairy imports from Argentina and Uruguay. One of the measures is to apply the non automatic license for imports from those countries and establishing a quota. Trade analysts attribute this increase to two factors: a) valuation of the Brazilian currency relative to the U.S. dollar in 2009; and, b) lower fluid milk production.

Argentina and Uruguay are the major suppliers of powdered milk to Brazil, accounting for 89 percent of total imports, comprised mostly of whole milk powder (83 percent of the total imported). Brazil also imported from the United States for

the first time since 2005 a total of 1 MT of milk powder. The United States continues to be competitive in other dairy ingredients such as whey powder and lactose, accounting for 20 percent of total imports in 2008.

Exports of powdered milk are estimated to decline in 2009, as the main importers -Algeria and Venezuela - reduced the import volume in the first quarter of 2009. Brazilian powdered milk was not competitive in the international markets at that time. Brazil's strategy is to increase exports to Middle East and Africa. One of the largest Brazilian producers set up an office in Dubai to promote dairy sales, with a focus in milk powder and evaporated milk.

## Tariff Rate Table

Tariff Number (HTS)	Product Description	Rate (%) CXT *	Other Info
0402.21.10	Whole Milk Powder (1)	16	Mercosul: 27%
0402.21.20	Nonfat Milk, Powder (1)	16	Mercosul: 27%
0404.10.00	Whey Powder (2)	14	Mercosul: 27%

- CXT: MERCOSUL Common External Tariff. This tariff is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product.

### Notes:

- Effective June 1, 2001, milk powder was included in the "exception list" of the Common External Tariff (CXT), of the MERCOSUL, per Resolution 16/01, of the Foreign Trade Chamber (CAMEX), which altered Annex Two of the Decree Number 3.704 of December 27, 2000. The 27 percent tax is charged to all markets in addition to the import tariff of 16 percent to all markets, including MERCOSUL members.

(2) Effective August 26, 2002, whey powder was included in the "exception list" of the Common External Tariff (CXT), of MERCOSUL, per Resolution 21, of the Foreign Trade Chamber (CAMEX), published in the Diario Oficial (Brazil's Federal Register) on August 26, 2002. The 27 percent tax is charged in addition to the Import Tariff of 14 percent to all markets, including MERCOSUL members.

In addition to the above tariffs, the Brazilian Foreign Trade Board (CAMEX) published the final report of their official dumping investigation, with the following results:

Country	Companies	Applied Rates (%)
New Zealand	New Zealand Dairy Board	3.9
	All other companies	3.9
European Union	All companies, except Arla Foods Ingredients Amba (see note below)	14.8
	Cerealin S.A.	16.9
Uruguay	All companies (see note below)	16.9

Note: Argentina, and later Uruguay, negotiated with Brazilian officials a minimum export price for powdered milk exports to Brazil. Arla Foods Ingredients Amba from Denmark also negotiated a minimum export price.

The minimum price was established at US\$ 1,900 per metric ton, FOB, and calculated using USDA's price list.

**Stocks:** There are no official government of stocks of powdered milk in Brazil.

**Policy:**

Please see section under Fluid Milk.

## Production, Supply and Demand Data Statistics:

PSD: Dairy, Dry Whole Milk Powder

Dairy, Dry Whole Milk Powder Brazil	2008			2009			2010			
	2008			2009			2010			
	Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			Market Year Begin: Jan 2010			
	USDA Official Data		Old Post	USDA Official Data		Old Post	USDA Official Data		Jan	
			Data			Data			Data	
Beginning Stocks	0	0	0	0	0	0			0	(1000 MT)
Production	580	535	572	640	640	473			518	(1000 MT)
Other Imports	20	20	23	15	15	67			40	(1000 MT)
Total Imports	20	20	23	15	15	67			40	(1000 MT)
Total Supply	600	555	595	655	655	540			558	(1000 MT)
Other Exports	75	32	83	110	110	13			15	(1000 MT)
Total Exports	75	32	83	110	110	13			15	(1000 MT)
Human Dom. Consumption	525	523	512	545	545	527			543	(1000 MT)
Other Use, Losses	0	0	0	0	0	0			0	(1000 MT)
Total Dom. Consumption	525	523	512	545	545	527			543	(1000 MT)
Total Use	600	555	595	655	655	540			558	(1000 MT)
Ending Stocks	0	0	0	0	0	0			0	(1000 MT)
Total Distribution	600	555	595	655	655	540			558	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
CY. Exp. to U.S.	0	0	0	0	0	0			0	(1000 MT)

PSD: Dairy, Nonfat Dry

Dairy, Milk, Nonfat Dry Brazil	2008			2009			2010			
	2008			2009			2010			
	Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			Market Year Begin: Jan 2010			
	USDA Official Data		Old Post	USDA Official Data		Old Post	USDA Official Data		Jan	
			Data			Data			Data	
Beginning Stocks	0	0	0	0	0	0			0	(1000 MT)
Production	133	135	128	140	140	125			120	(1000 MT)
Other Imports	6	5	7	5	5	13			20	(1000 MT)
Total Imports	6	5	7	5	5	13			20	(1000 MT)
Total Supply	139	140	135	145	145	138			140	(1000 MT)
Other Exports	1	8	1	2	2	3			3	(1000 MT)
Total Exports	1	8	1	2	2	3			3	(1000 MT)
Human Dom. Consumption	138	132	134	143	143	135			137	(1000 MT)
Other Use, Losses	0	0	0	0	0	0			0	(1000 MT)
Total Dom. Consumption	138	132	134	143	143	135			137	(1000 MT)
Total Use	139	140	135	145	145	138			140	(1000 MT)
Ending Stocks	0	0	0	0	0	0			0	(1000 MT)
Total Distribution	139	140	135	145	145	138			140	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
CY. Exp. to U.S.	0	0	0	0	0	0			0	(1000 MT)